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Chatbots for Small Businesses

Why chatbots work, what they cost, and how to build one that answers calls, qualifies leads, and books appointments instead of scaring people away.

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INTRODUCTION

Your phone is buzzing. Again.

It's 9 PM on a Tuesday. Another potential customer wants to know if you're open tomorrow. Or maybe they need pricing information. Or they want to schedule an appointment, but your booking system is down.

Thousands of small business owners face this exact scenario every single day. Customer expectations have shifted dramatically. People want instant answers and solutions that work around their schedule, not yours.

This is where website chatbots step into the picture. Think of them as your digital employees who never sleep. They never take sick days. They can also handle multiple conversations at once.

These automated assistants can answer common questions, capture leads, and schedule appointments. They provide basic customer support while you focus on actually running your business.

But should you actually get one? This is the question that most business owners struggle with.

The chatbot industry loves throwing around impressive statistics and flashy success stories. Meanwhile, you're trying to figure out if this technology makes sense for your specific situation. You're wondering about costs, complexity, and whether your customers will even use it.

This book cuts through the marketing noise. We'll explore what modern chatbots can realistically accomplish for businesses like yours. You'll discover real examples from successful small business implementations. You'll understand the genuine benefits that matter to your bottom line, and learn about the limitations and challenges that the sales pages conveniently forget to mention.

More importantly, you'll get practical guidance on choosing the right solution, implementing it without major headaches, and measuring whether it's actually helping your business grow. By the end, you'll have enough information to make a confident decision about whether a chatbot belongs on your website.

Ready to explore your options? Let's separate the reality from the hype and find out if a digital assistant could be your next smart business move.

WHAT CHATBOTS CAN DO FOR YOUR BUSINESS

A potential customer visits your website at 2 AM. They're looking for information about your services. They have questions about pricing, availability, or how to get started.

In most cases, they'll leave empty-handed because no one is there to help them. But what if someone was always there to help? What if you could have a digital assistant that never sleeps, never takes sick days, and can handle your most common customer questions around the clock?

That's exactly what a chatbot can do for your small business. According to HubSpot research, 90% of consumers consider receiving an "immediate" response to customer service inquiries as important, with 60% expecting that response within 10 minutes or less. Your chatbot can deliver that instant response. You probably can't at 2 AM on a Tuesday.

This chapter will show you the three main ways chatbots can transform how your small business serves customers and captures leads. You'll see real examples of businesses just like yours using these tools successfully. By the end, you'll understand exactly what chatbots can do and whether they might work for your situation.

The Customer Service Powerhouse

The most obvious use for a chatbot is answering customer questions. Think about the questions you get asked repeatedly. What are your hours? Do you offer delivery? What's your return policy? How much does it cost?

These repetitive questions eat up your time. They're perfect for a chatbot to handle not just because they're common, but because speed and consistency matter.

A well-set-up chatbot can instantly answer common questions without any human help. When a customer asks about your business hours, the chatbot responds immediately with the correct information. When someone wants to know about your services, the chatbot can provide detailed descriptions and even suggest the best option for their needs.

The beauty of this system is consistency. Your chatbot gives the same accurate information every single time. No more worrying about staff giving different answers or forgetting important details. The information is always correct and always available.

Real Examples That Work

Take, for example, Maria's family restaurant in downtown Austin. Before adding a chatbot, Maria spent hours each day answering phone calls about reservations, menu questions, and hours of operation. Now her chatbot handles reservation requests, tells customers about daily specials, and answers questions about dietary restrictions. Maria can focus on cooking and serving customers instead of being stuck on the phone.

Another example is Tom's sporting goods store. His chatbot helps customers check if specific shoe sizes are in stock, explains return policies, and provides information about upcoming sales. Customers get instant answers, and Tom's staff can focus on helping people who need more detailed assistance in the store.

Chatbots handle common questions effectively across different businesses. These include inquiries about business hours, location information, delivery and shipping options, return and refund policies, product availability, pricing details, accepted payment methods, order tracking capabilities, options for canceling or changing orders, and comprehensive service offerings. The beauty of chatbots lies in their ability to provide instant, consistent responses to these routine inquiries that would otherwise consume valuable staff time and potentially frustrate customers waiting for answers.

The Lead Generation Machine

Here's where chatbots get really interesting for small business owners. Instead of hoping visitors will fill out a contact form, chatbots can actively engage with people and collect their information in a natural conversation.

Traditional contact forms are boring and often ignored. A chatbot can ask the same questions in a friendly, conversational way that feels much more personal.

Instead of a static form asking for name, email, and message, a chatbot takes a different approach. It might say: "Hi! I'd love to help you learn more about our services. What's the biggest challenge you're facing with your business?"

This conversational approach gets much better results. People are more likely to engage with a chatbot that asks questions one at a time than fill out a long form. The chatbot can also ask follow-up questions to better understand what the customer needs, making it easier for you to help them when you follow up.

Beyond Basic Contact Forms

Smart chatbots can qualify leads automatically. They ask the right questions to figure out if someone is a good fit for your business. For example, if you're a web designer, your chatbot might ask about budget, timeline, and what type of website they need. Based on their answers, the chatbot can prioritize which leads you should call first.

The chatbot can also schedule appointments directly. Instead of the back-and-forth emails trying to find a good time to meet, the chatbot can show available slots and book the appointment immediately. This removes friction from the process and makes it easier for customers to take the next step.

Traditional contact forms create a static, one-size-fits-all experience that often leads to high abandonment rates and captures only basic information with no immediate response or personal touch. Manual scheduling becomes necessary, creating an impersonal experience for potential customers. Chatbot lead capture transforms this process by offering interactive, personalized questions that adapt to each visitor's specific needs and circumstances. This approach typically achieves higher completion rates because the conversational format feels more natural and engaging than filling out lengthy forms.

Chatbots provide instant engagement from the moment someone visits your website, creating an immediate connection that keeps potential customers interested. They can perform detailed lead qualification by asking targeted questions that help determine budget, timeline, specific needs, and purchasing authority.

This information allows you to prioritize your follow-up efforts and tailor your approach to each prospect. The automatic appointment booking feature eliminates the tedious back-and-forth communication that often causes potential customers to lose interest, instead offering a smooth, frictionless path from initial interest to scheduled consultation.

The Always-On Business Assistant

The biggest advantage of chatbots might be their availability. Your chatbot works around the clock. It operates when you sleep, spend time with family, or focus on other business tasks. It never takes a vacation or calls in sick.

This constant availability is huge for customer satisfaction. When people have questions outside business hours, they get immediate help instead of waiting until the next day. This can be the difference between winning and losing a customer, especially when they're comparing you to competitors.

For businesses that serve customers in different time zones, chatbots are especially valuable. Your chatbot can serve customers on the East Coast while you're still sleeping on the West Coast. It can handle international customers at any hour.

Modern chatbots can also work in multiple languages. If you have Spanish-speaking customers, your chatbot can communicate with them in their preferred language. This opens up new markets without requiring bilingual staff.

Many chatbots integrate with your existing business tools. They can add new leads to your email list, create tasks in your project management system, or send information to your sales tracking software. This means the conversations don't just happen in isolation but connect to your broader business processes.

Case Study: After-Hours Success

Jessica runs a home cleaning service in Phoenix. She noticed that many potential customers were visiting her website in the evenings and on weekends, but she was missing these opportunities because her phone wasn't answered outside business hours.

After adding a chatbot, Jessica started capturing leads 24/7. The chatbot asks visitors about their cleaning needs, home size, and preferred schedule. It then provides an instant quote estimate and offers to schedule a consultation.

According to IBM, chatbots can answer up to 79% of routine questions. With chatbots, businesses can reduce routine support workload significantly while capturing leads that would have been lost.

Jessica now gets qualified leads even when she's asleep, and customers love getting immediate responses to their questions. Her business has grown significantly since implementing the chatbot, mostly from previously missed opportunities.

What This Means for Your Business

Chatbots excel at three core functions: answering repetitive questions, capturing and qualifying leads, and providing round-the-clock availability. They're not magic solutions that will solve every business problem, but they're powerful tools for handling routine tasks that currently take up your valuable time.

The key insight is that chatbots work best for predictable, repetitive interactions. They work best when customers need quick answers to common questions. They also excel at capturing leads outside business hours, though they struggle with complex problems that require human judgment, empathy, or creative problem-solving.

In the next chapter, we'll explore the specific benefits chatbots can bring to your business, including the time and money you can save. We'll also look at real numbers so you can understand the potential return on investment for your situation.

For now, think about your business and the repetitive questions you answer daily. Consider the leads you might be missing when you're not available. These are the areas where a chatbot could make the biggest difference. The goal isn't to replace human interaction entirely, but to handle the routine stuff so you can focus on the work that really needs your personal attention.

BUSINESS BENEFITS THAT COUNT

You're finally sitting down to dinner with your family when your phone buzzes. Another customer question. If you're like most small business owners, this scene plays out almost daily. Your customers expect quick answers, but you also need time to run your business and live your life.

This constant pull between customer service and everything else you need to do creates real stress. You want to help every customer, but you also can't be available every minute of every day. This is where chatbots shine. They handle the routine questions so you can focus on what matters most.

Let's look at the real benefits chatbots bring to small businesses. These aren't just technical features but solutions to problems you face every day.

Time Freedom That Actually Matters

The biggest benefit most business owners notice first is time. Chatbots handle the same questions over and over: How much does this cost? What are your hours? Do you deliver? Can I return this item? These questions eat up hours of your day.

When a chatbot answers these routine questions, something amazing happens. You get your time back. Not just a few minutes here and there, but hours every week—hours you can spend growing your business instead of answering the same questions repeatedly.

Think about your typical day. How much time do you spend on customer service? Now imagine cutting that time in half. What could you do with those extra hours? You could focus on new products, work on marketing strategies, or actually take a lunch break without worrying about missed calls.

Being always available takes a toll. It affects your sleep, your family time, and your peace of mind. Customers expect instant answers, but that doesn't mean you have to provide them personally.

The mental stress of 24/7 customer expectations is real. You check your phone during dinner, answer emails on weekends, and feel guilty when you don't respond right away. This constant pressure hurts your work-life balance and your overall well-being.

A chatbot breaks this cycle. It handles questions when you're not available. Your customers get instant answers, and you get to disconnect without guilt.

This isn't about being lazy or avoiding customers, but about sustainable business practices that let you serve customers well without burning out. Chatbots can immediately take several tasks off your plate, including answering basic product questions, providing store hours and location information, explaining return and shipping policies, collecting customer contact information, scheduling appointments or consultations, and handling simple order status inquiries.

Money in Your Pocket

Time savings are great, but chatbots also impact your bottom line in real ways. They help you make more money while spending less on customer service.

First, let's talk about what you save. Hiring even part-time customer service help costs real money. A part-time employee working 20 hours a week at \$18 per hour costs over \$1,400 per month before taxes, benefits, or training costs.

In contrast, a chatbot that handles basic customer service typically costs between \$50 and \$150 per month, 24 hours a day, 7 days a week. The math is clear.

But saving money on staff isn't the only financial benefit. Chatbots also help you make more money because they can respond to customers instantly. When someone visits your website at midnight with a question, your chatbot answers right away. Without a chatbot, that person might go to a competitor who responds faster.

According to SuperAGI, case studies and selected implementations of AI-powered chatbots for small businesses have resulted in conversion rate improvements ranging from 12% to 25%. Some individual companies have reported even higher sales or conversion lifts in specific scenarios, with notable examples achieving up to a 30% or greater increase following chatbot adoption.

One e-commerce company reduced its average response time from 2 hours and 15 minutes to just 5 minutes, contributing significantly to improved conversions and customer satisfaction. This happens because customers get immediate help when they're ready to buy. Speed-to-lead response times improve dramatically with chatbots, and when combined with personalization features, businesses can see even greater conversion improvements.

Let's look at a simple comparison. Say you're considering hiring someone part-time to handle customer questions. That person would work 20 hours per week at \$18 per hour. A part-time employee at this rate costs \$1,440 per month, plus payroll taxes and benefits, adding another \$200–400, and training and management time costing \$100–200 more.

Add everything up and you have a total monthly cost that ranges from \$1,740–2,040. Compare that to a basic business chatbot that costs \$50–150 per month. That creates a monthly savings of \$1,590–1,890 for you.

The chatbot works 24/7 without breaks, sick days, or vacation time. It handles unlimited conversations simultaneously, while a human employee can only talk to one customer at a time during scheduled hours.

These savings add up quickly. Over a year, you could save \$19,000 or more compared to hiring part-time help. That's money you can invest in growing your business instead of just maintaining it. According to IBM, businesses also experience **30% reductions in customer support costs** due to chatbots handling initial queries and filtering leads more efficiently.

Customer Satisfaction Without the Stress

Your customers want fast answers and don't want to wait until business hours to ask a simple question. They definitely don't want to leave a voicemail and wait for a callback about your store hours. As you already know, most customers expect immediate responses to their questions. Your chatbot can deliver that even at the most ungodly hour on any day, keeping your brand accessible, responsive, and helpful regardless of whether it's a weekday or weekend.

Chatbots meet modern customer expectations for instant service. When someone visits your website, they can get help immediately without waiting for you to finish with another customer or calling during specific hours. Because of your chatbots, they get the information they need right away.

This instant availability builds trust. Customers see that your business is responsive and helpful. Even when they know they're talking to a bot, they appreciate getting quick answers to simple questions.

Chatbots also provide consistent answers. When you're tired or having a bad day, your customer service might suffer. Chatbots give the same helpful, professional response every time without moods or off days. This consistency helps build your brand reputation. According to an Intercom survey, companies report up to a **24% boost in customer satisfaction scores** after chatbot implementation due to faster responses and round-the-clock support.

The best part is that chatbots handle the routine stuff, so you can focus on complex customer needs. When a customer has a serious problem or a special request, you can give them your full attention. You're not rushed because you have five other people waiting with simple questions. You can provide better service to customers who really need human help.

This isn't about replacing human customer service but making human customer service better. When chatbots handle the basic questions, you can spend quality time with customers who need more help. The personalization, contextual understanding, and seamless handoffs to human agents are critical features that drive these improvements. When chatbots are integrated with other business systems and can offer tailored responses, businesses see even higher conversion gains.

Making the Business Case

The benefits are real and measurable. You save time and money while your customers get faster service. You reduce stress and improve your quality of life. For most small businesses, these benefits far outweigh the challenges of setting up and maintaining a chatbot.

The financial impact alone makes a compelling case. When you consider the monthly savings compared to hiring staff, the improved conversion rates, and the enhanced customer satisfaction, chatbots represent one of the most cost-effective investments a small business can make. The technology has matured to the point where implementation is straightforward, and the results are predictable.

But chatbots aren't perfect for every business or every situation. In the next chapter, we'll examine the challenges and limitations you should know about before making your decision.

WHERE CHATBOTS FALL SHORT

The glossy marketing materials make it sound effortless. Install a chatbot, watch it handle customer service automatically, and sit back while your business runs itself. Small business owners who fall for this promise often discover an expensive lesson:

*Chatbots aren't the magical solution they're marketed to be**.*

The biggest mistake small businesses make with chatbots isn't technical, it's treating them as a cure-all for customer service challenges. This misconception can drain your resources, frustrate your customers, and ultimately damage your reputation. Before you add a chatbot to your website, you need to understand exactly where these tools struggle and why many implementations fail completely.

When Chatbots Hit the Wall

Chatbots excel at handling straightforward, predictable interactions. They can answer frequently asked questions about your hours, collect email addresses for newsletters, and provide basic product information. But the moment a conversation requires human judgment, emotional intelligence, or creative problem-solving, chatbots reveal their fundamental limitations.

Consider the complexity of real customer service situations. A customer calls because their wedding flowers arrived wilted on the morning of their ceremony. Another needs help choosing between three software packages for their unique business setup. Someone else received the wrong medication and needs immediate assistance.

These scenarios demand empathy, critical thinking, and the ability to make judgment calls that go beyond scripted responses. They can't be resolved with a FAQ link or an automated reply. They require a human touch, contextual understanding, and the discretion to bend policies when the situation calls for it.

Chatbots operate purely on pattern recognition and predetermined rules. They can't read between the lines of what a customer is really asking.

When someone types "My order was supposed to arrive yesterday for my daughter's birthday party today. What can you do to help?" a human immediately recognizes the urgency and emotional stakes. They understand this requires special handling and quick action. A chatbot, however, might simply respond with "I can help you track your order. Please provide your order number," completely missing the context that makes this situation critical.

The inability to understand tone, subtext, or emotional urgency becomes particularly problematic in sensitive situations. Chatbots can't recognize when a customer is frustrated, scared, or confused. They can't adjust their communication style based on whether someone is tech-savvy or needs extra guidance. This rigidity often escalates simple problems into major customer service failures.

Not every business sees immediate success with chatbot implementation, and results can vary widely depending on factors like industry, business model, and execution. For example, some B2B companies find it challenging to generate high-quality leads through chatbots, especially when their buyers have complex needs that require human interaction. In these cases, a chatbot may support (**but not replace**) more consultative sales or support approaches.

The Frustration Factor and Its Consequences

Nothing damages customer relationships faster than a poorly functioning chatbot that traps users in endless loops of irrelevant responses. We've all experienced the mounting frustration of trying to get help from a bot that doesn't understand our question, keeps suggesting unrelated solutions, or refuses to connect us with a human agent.

When customers have negative experiences with your chatbot, they don't blame the technology—they blame your business. They don't think, "This AI needs better programming." Instead, they conclude, "This company doesn't care about helping me," or "They're trying to avoid talking to customers." This perception can be devastating for small businesses that depend on personal relationships and excellent customer service to compete with larger competitors.

Customer demographics play a crucial role in chatbot acceptance. According to Forbes, **only 4% of Baby Boomers prefer starting customer service interactions with a chatbot**, while a LiveChat report featured by Chatbot.com shows that even among Gen Z, only 20% say they prefer using chatbots. If your customer base skews older, a chatbot might create more problems than it solves, potentially alienating the very people you're trying to serve.

Certain situations require human interaction and should never be handled by automated systems. Complaints about defective or damaged products need immediate escalation and often require exceptions to standard policies. Complex technical support issues require troubleshooting skills and the ability to think through unique scenarios. Emotional situations like wedding planning, funeral services, or medical concerns demand empathy and sensitivity that no chatbot can provide.

High-value sales conversations, legal or medical advice requests, billing disputes, and custom orders all require the nuanced understanding that only humans possess. When chatbots attempt to handle these situations, they often make promises the business can't keep, provide incorrect information, or create misunderstandings that damage customer relationships.

The Hidden Complexity of Implementation

The chatbot industry has built its marketing around the myth of "set it and forget it" automation. This narrative particularly appeals to small business owners who are already stretched thin and desperately need tools that actually save time. Unfortunately, **the reality of chatbot ownership involves significant ongoing maintenance and unexpected complexity.**

Initial setup takes far longer than most businesses anticipate. You need to map out every possible conversation path, write responses that match your brand voice, integrate the system with your existing tools, and test countless scenarios. For a basic chatbot, plan on at least one to three weeks of concentrated effort. More sophisticated implementations can take months to get right.

But setup represents only the beginning of your time investment. Chatbots require continuous maintenance to remain effective. Customer questions evolve over time. Your products and services change. Seasonal variations create new inquiry patterns. Industry regulations might require updated responses. Without regular attention, your chatbot quickly becomes outdated and unhelpful.

Most small business owners discover gaps in their chatbot's knowledge within the first few weeks of launch. Customers ask questions you didn't anticipate, use different wording than you expected, or need help with scenarios you didn't program. Each gap requires analysis, new content creation, and system updates. This process never truly ends if you want your chatbot to remain useful.

Technical problems add another layer of complexity. Website updates can break chatbot integrations. Third-party systems might change their APIs, causing your booking or payment connections to fail.

Your chatbot provider also might modify their features, pricing, or terms of service. Some small businesses find themselves spending more time managing their chatbot than they save from automation, completely defeating the purpose of the investment.

Smart business owners budget for ongoing maintenance, planning to spend at least two to four hours monthly reviewing conversations and making updates. Quarterly strategy reviews require an additional 4–6 hours to analyze performance and adjust the approach. Annual platform evaluations can take 8–10 hours as you assess whether your current solution still meets your needs or if alternatives might work better.

Recognizing When Chatbots Don't Fit

Some businesses shouldn't use chatbots at all, and recognizing this isn't a sign of being behind the times—it's understanding your customers and priorities.

Businesses selling complex, expensive products often see minimal benefit from chatbot automation.

The sales process requires detailed consultation, relationship building, and customized solutions that can't be reduced to scripted conversations.

Professional service businesses face similar challenges. A therapist or counselor builds relationships through personal connection. A custom furniture maker needs to discuss intricate design requirements and understand aesthetic preferences, and a funeral home must handle sensitive conversations with extraordinary empathy and care. These businesses depend on human expertise and emotional intelligence that no chatbot can replicate.

Before considering a chatbot, honestly assess whether your business receives repetitive questions that could be automated. Do customers frequently need help outside your normal business hours? Are you comfortable learning new technology and committing time to proper implementation? Would your typical customers be open to chatting with a bot, or do they expect immediate human contact?

Determine whether you have clear, measurable goals for chatbot implementation beyond just "improving customer service." Can you handle the inevitable situations when your chatbot can't help and needs to escalate to human support? If you answered "no" to most of these questions, your business might not be ready for chatbot implementation.

Understanding chatbot limitations actually helps you make better decisions about customer service automation. When you know what these tools can't do, you can plan around those gaps, set realistic expectations, and avoid the costly mistakes that plague many small business implementations. The companies that succeed with chatbots view them as specialized tools for specific tasks, not magic solutions for every customer service challenge.

The next chapter will explore the different types of chatbots available, helping you understand which approach might work best for your specific situation and constraints while avoiding the common pitfalls that lead to failed implementations.

CHOOSING THE RIGHT TYPE OF CHATBOT

Every small business owner faces the same dilemma: how do you choose the right chatbot when you're drowning in options, features, and promises that all sound too good to be true? The reality is that the best chatbot for your business isn't necessarily the one with the most sophisticated artificial intelligence or the longest list of features. Instead, it's the one that perfectly matches your actual needs without overwhelming your budget or technical capabilities.

This misconception leads many entrepreneurs down two equally problematic paths. Some choose overly simple solutions that frustrate customers with robotic responses and limited functionality. Others invest in complex AI systems that require constant maintenance and technical expertise they don't possess. Both approaches waste money and create more problems than they solve.

The secret lies in understanding exactly what your customers need and matching those requirements with the appropriate level of chatbot sophistication. This chapter will guide you through the two main categories of chatbots available to small businesses and help you make an informed decision based on your specific circumstances.

Understanding Rule-Based Chatbots

Rule-based chatbots operate on straightforward if-then logic, functioning like well-trained digital receptionists who follow a carefully crafted script. When a customer types "What are your hours?" the bot responds with your business hours. When someone clicks "Product Information," it displays your product details. These systems excel at handling predictable, repetitive interactions that follow clear patterns.

The beauty of rule-based chatbots lies in their reliability and simplicity. They perform exactly as programmed, every single time. There are no surprises, no misunderstood requests, and no unexpected responses that might confuse or frustrate your customers. For businesses that receive the same types of inquiries repeatedly, this consistency becomes a significant advantage.

Setting up a rule-based chatbot typically requires no programming knowledge. Modern platforms provide drag-and-drop interfaces that allow you to build conversation flows visually, similar to creating a flowchart. You can map out common customer journeys, from initial greet-

ing through problem resolution, using simple decision trees. Most business owners can create a functional bot within a few hours, and making updates later is equally straightforward.

The cost advantage cannot be overstated. Quality rule-based chatbot platforms typically range from \$20–100 per month, making them accessible even for businesses operating on tight budgets. When you consider that this cost covers 24/7 availability and unlimited customer interactions, the return on investment becomes clear. A single part-time employee would cost significantly more while providing far less coverage.

Maintenance requirements for rule-based bots remain minimal. When your business hours change, you update one response. When you launch a new product, you add it to the relevant conversation flow. If something stops working correctly, the linear nature of rule-based logic makes troubleshooting straightforward. You can typically identify and fix problems without technical support.

However, rule-based chatbots do have limitations. They struggle with unexpected questions or requests phrased differently than anticipated. If you program the bot to respond to "What are your hours?" but a customer asks "When do you close?", it might not understand unless you've specifically programmed that variation. This rigidity can frustrate customers who don't communicate in the exact patterns you've anticipated.

Exploring AI-Powered Conversational Assistants

AI-powered chatbots represent a significant leap forward in chatbot technology, utilizing natural language processing and machine learning to understand customer intent rather than just matching keywords. These sophisticated systems can interpret various ways of asking the same question, maintain context throughout longer conversations, and even learn from interactions to improve their responses over time.

The primary advantage of AI chatbots is their flexible handling of human communication. Customers can phrase questions naturally without worrying about using specific keywords or following predetermined conversation paths. An AI bot understands that "How late are you open tonight?", "What time do you close?", and "Are you still open?" all relate to business hours, even though the wording differs significantly.

These systems excel at managing complex customer journeys that involve multiple steps or decision points. For example, an AI chatbot helping a customer return an item can ask qualifying questions, determine the appropriate return method, provide shipping instructions, and even initiate the return process within your system. This level of sophisticated interaction would require extensive programming with a rule-based system and might not handle variations in customer responses effectively.

Learning capabilities set AI chatbots apart from their rule-based counterparts. As the system processes more customer interactions, it identifies patterns in how your specific audience communicates and what types of problems they encounter most frequently. This continuous

improvement means the chatbot becomes more effective at serving your customers over time, often discovering optimization opportunities you might not have considered.

The investment required for AI-powered chatbots reflects their advanced capabilities. Monthly costs typically range from \$100–500 or more, depending on the platform and feature set. Beyond the direct costs, these systems require more time investment for initial setup, ongoing training, and performance monitoring. You'll need to review conversation logs regularly, identify areas where the AI misunderstood customer intent, and provide additional training data to improve accuracy.

Integration capabilities often distinguish AI chatbots from simpler alternatives. These systems can typically connect with customer relationship management software, inventory systems, scheduling platforms, and other business tools. This connectivity enables more sophisticated automation, such as checking product availability in real time or scheduling appointments based on current availability.

Despite their advantages, AI chatbots aren't always the optimal choice. They can sometimes provide responses that sound confident but contain inaccuracies, especially when handling topics outside their training data. The complexity can also make troubleshooting more challenging when problems arise, potentially requiring technical expertise or vendor support to resolve issues.

Making the Strategic Choice

The decision between rule-based and AI-powered chatbots should align with three critical factors: your financial resources, technical comfort level, and customer interaction complexity.

Budget considerations extend beyond monthly subscription fees to include setup time, ongoing maintenance, and potential integration costs. While rule-based chatbots offer predictable, lower costs, AI systems might provide better long-term value if they significantly reduce support workload or increase sales conversion rates.

Technical requirements differ substantially between the two approaches. Rule-based systems typically require only basic computer skills and logical thinking to set up and maintain. AI chatbots often demand a more sophisticated understanding of customer service principles, conversation design, and system integration. Consider honestly whether you have the time and inclination to invest in learning these more complex systems.

Customer expectation analysis should drive your decision more than feature lists or marketing claims. Examine your actual customer service interactions over the past few months. Do customers typically ask straightforward questions that have clear, factual answers? Or do they often need personalized recommendations, complex problem-solving, or detailed guidance through multi-step processes? Simple needs often pair perfectly with rule-based solutions, while complex requirements might justify AI investment.

Growth trajectory planning also influences the optimal choice. If you're planning significant business expansion, product line extensions, or service area growth, investing in a more scalable AI solution from the beginning might prove more cost-effective than upgrading later.

Conversely, if your business model is stable and well-defined, a rule-based system might serve your needs indefinitely.

The most successful small business chatbot implementations often start with simpler solutions that match immediate needs rather than anticipated future requirements. You can gather valuable data about customer interaction patterns, identify the most common support issues, and develop a clear understanding of where automation provides the greatest value. This information becomes invaluable when and if you decide to upgrade to more sophisticated technology later.

Most small businesses will find that rule-based chatbots provide excellent value and functionality for their initial automation needs. The key is choosing a platform that serves your current requirements effectively while remaining flexible enough to grow with your business. Focus on solving today's problems well rather than preparing for every possible future scenario.

FROM IDEA TO LIVE CHATBOT

Building a chatbot might feel overwhelming when you're staring at the blank page of possibility, but the reality is far more straightforward than most business owners imagine. You've already done the hardest work by understanding what chatbots can accomplish and identifying whether one fits your business needs. Now you need a clear path forward.

This chapter transforms chatbot implementation from a daunting technical project into a manageable business initiative. You'll discover how to plan strategically, set up your chatbot without wrestling with complex code, and launch successfully within two weeks.

The process requires careful thinking about your customers' needs rather than advanced technical skills. Many small business owners delay implementation because they assume it requires months of preparation and programming expertise. The truth is that modern chatbot platforms are designed for business owners, not programmers.

What matters is approaching implementation systematically. You'll start by mapping your customers' most common questions and needs, then translate those insights into helpful automated conversations. From there, you'll select the right platform for your requirements and budget, integrate it with your existing website, and launch with confidence. By maintaining focus on solving real customer problems rather than showcasing technical capabilities, you'll create a valuable business tool that genuinely improves customer experience.

Planning Your Chatbot Strategy

Success begins long before you create your first automated response. **Strategic planning** determines whether your chatbot becomes a valuable team member or an expensive digital ornament that frustrates customers and wastes your time. This planning phase requires honest evaluation of your current customer service patterns and clear thinking about your business priorities.

Start by identifying your **primary use case** with laser focus. Resist the temptation to solve every customer service challenge simultaneously. Narrowing your scope helps ensure the chatbot delivers real value from day one, rather than offering vague or shallow answers across too many areas. A focused rollout also makes it easier to track performance and gather feedback for improvement.

Choose one main objective for your chatbot, whether that's answering frequently asked questions about store hours and policies, capturing contact information from website visitors, or providing basic product information. This singular focus allows you to create genuinely helpful responses rather than superficial interactions across too many topics. You can always expand your chatbot's capabilities after proving success in one area.

Next, examine how customers currently interact with your business. Review your email inbox, phone logs, and social media messages from the past month. Look for patterns in timing, topics, and the types of questions that prompt customers to reach out.

Pay particular attention to inquiries that make you think, "I've answered this question countless times." These repetitive interactions represent your chatbot's greatest opportunity to add value while freeing up your time for more complex customer needs.

Conversation flow mapping transforms these insights into structured interactions. Begin with each common customer question and work through the most helpful response sequence. Think of what additional information customers might need and what questions typically follow your initial answer.

For example, when someone asks about your return policy, they often want to know about specific time limits, condition requirements, and whether they need receipts. Planning these conversation paths in advance creates smoother customer experiences and reduces the likelihood of confusion or frustration.

Document your current customer service patterns by category, frequency, and complexity. Simple informational requests like business hours, location details, and basic pricing are perfect for chatbot automation. More complex inquiries involving custom quotes, technical troubleshooting, or complaint resolution should trigger handoffs to human team members. This analysis becomes your chatbot's job description and helps you set realistic expectations for both performance and limitations.

Create conversation flows that feel natural rather than robotic. Start each interaction with a friendly greeting that matches your brand voice, then offer specific help options rather than generic assistance. Plan for situations where your chatbot encounters questions it cannot answer by providing clear pathways to human support. The goal is creating helpful interactions that solve problems, not demonstrating technological sophistication that impresses visitors but fails to address their actual needs.

Technical Setup and Platform Selection

The technical implementation process has become remarkably accessible for non-technical business owners, thanks to platforms designed specifically for practical business use rather than programming expertise.

Platform selection shapes your entire chatbot experience, but analysis paralysis often prevents business owners from moving forward. Choose a platform based on your identified use cases, budget constraints, and integration requirements rather than seeking the theoretically perfect solution.

Research popular platforms like Chatfuel, ManyChat, and Tidio for straightforward implementations, or consider Intercom and Drift for more sophisticated features and analytics. Most platforms offer free trials that allow hands-on evaluation before committing to paid plans.

During these trials, focus on testing the features you actually need rather than exploring every available capability. Can you easily create the conversation flows you mapped during planning? Does the platform integrate smoothly with your website? Are the analytics sufficient for monitoring performance and identifying improvement opportunities?

Website integration typically involves copying a small code snippet and pasting it into your website's HTML or using a plugin if you're on WordPress, Shopify, or similar platforms. If this technical step feels intimidating, most platforms provide detailed instructions, video tutorials, or even setup assistance services. Many business owners discover that integration is much simpler than anticipated, often taking just a few minutes rather than hours of technical troubleshooting.

Testing deserves careful attention before launching to real customers. Work through every conversation path you've created, attempting to break your chatbot by asking unexpected questions or providing unusual responses.

Invite friends, family members, or employees to test the chatbot and provide honest feedback about their experience. Pay attention to moments where conversations feel awkward, responses seem unhelpful, or users appear confused about next steps. These insights during testing prevent customer frustration later and help you refine responses for clarity and usefulness.

Evaluate **mobile optimization** carefully since most website visitors likely use smartphones or tablets. Test your chatbot on various mobile devices to ensure it displays properly, responds quickly, and doesn't interfere with other website functions. A chatbot that works perfectly on desktop computers but creates problems on mobile devices will frustrate the majority of your potential users.

Establish clear handoff procedures that activate when your chatbot encounters questions beyond its capabilities. Train your team to recognize when they're receiving conversations from the chatbot and how to access previous interaction history for context. Create backup plans for technical issues, such as chatbot downtime or integration problems, ensuring customers can always reach human support when needed.

Launch Strategy and Initial Optimization

Your chatbot launch should be a measured rollout rather than a dramatic announcement, allowing you to monitor performance closely and make adjustments based on real customer interactions. **Soft launching** means activating your chatbot for live customer interactions while main-

taining close oversight and readiness to intervene when necessary. This approach reduces pressure while providing valuable data about actual usage patterns versus your planning assumptions.

Prepare your team thoroughly before going live, even though the chatbot handles interactions automatically. Team members need to understand how the chatbot works, when it will transfer conversations to humans, and how to access conversation history for context. Establish clear protocols for taking over chatbot conversations and following up on leads or issues identified through automated interactions. This preparation ensures smooth operations and maintains consistent customer service quality across all interaction types.

Monitor conversations actively during your first week of operation, expecting to make daily adjustments as you observe how real customers interact with your chatbot. Focus on identifying patterns in customer confusion, frequently asked questions that your chatbot handles poorly, and opportunities to improve response clarity. Most successful chatbot owners report significant improvements after their first month of real-world usage, as they learn from actual customer behavior rather than theoretical planning.

Performance optimization during your first 30 days focuses on quick fixes rather than major feature additions. If multiple customers ask similar follow-up questions, your initial responses likely need more detail. If customers seem frustrated at specific points in conversations, those interaction paths require smoothing out. If your chatbot isn't recognizing variations of common questions, you may need to add alternative phrasings to improve recognition accuracy.

Pay attention to timing and engagement triggers during this initial period. A chatbot that seems too aggressive in starting conversations may annoy visitors, while one that's too passive might miss opportunities to help. Adjust greeting timing, trigger conditions, and conversation offers based on actual customer response patterns rather than assumptions about their preferences.

Address technical issues promptly by leveraging your platform's support resources rather than spending hours troubleshooting problems yourself. Most chatbot platforms maintain knowledgeable support teams who can quickly resolve integration conflicts, performance problems, or feature questions. Focus your energy on optimizing customer interactions rather than wrestling with technical details that experts can handle more efficiently.

Success with your chatbot implementation comes from treating launch day as the beginning of an ongoing improvement process rather than a final destination. Your chatbot will become more valuable over time as you refine responses based on real customer interactions and gradually expand its capabilities.

Start with reliable handling of common questions rather than pursuing complex features, building confidence, and demonstrating value before adding sophistication. This measured approach creates a valuable business tool that genuinely improves customer experience while reducing your workload, setting the foundation for continued growth and refinement as your business evolves.

MEASURING SUCCESS AND GROWING YOUR CHATBOT

Your chatbot's launch marks the beginning of a data-driven journey that can transform how you understand your customers. Right now, if you opened your website analytics, you might struggle to see how many potential customers you lost. Last week alone, some visitors may have left because no one was available to help them. Here's the good news: your chatbot can give you those answers and many more insights about your business.

Think of your chatbot as more than just a customer service tool. It's actually a powerful business intelligence system that works around the clock. Every conversation provides valuable information. You'll learn what customers want, when they need help, and how to serve them better.

Many small business owners make the mistake of launching their chatbot and then forgetting about it. They treat it like a "set it and forget it" appliance. But the most successful businesses use their chatbots as learning tools that get smarter and more valuable over time. The difference between a forgotten chatbot and a thriving one lies in consistent monitoring, analysis, and improvement based on real customer interactions.

The Numbers That Matter

Your chatbot generates data every single day. But not all data is equally important. You need to focus on the metrics that actually tell you if your chatbot is helping your business grow.

Understanding these key performance indicators will help you make informed decisions about your chatbot's effectiveness and identify areas for improvement.

The most important number to track is your **conversation completion rate**. This tells you how many people who start talking to your chatbot actually get the help they need. A good completion rate is usually between 70% and 85%. If your rate is much lower, it means people are getting frustrated and leaving without getting answers. This metric serves as your primary indicator of customer satisfaction and chatbot effectiveness.

Response time is another critical metric that directly impacts customer satisfaction. A study by the *Harvard Business Review* found that businesses responding to potential customers within an hour are nearly seven times more likely to qualify leads effectively compared to those who responded after just one hour, and over 60 times more likely than those who waited 24 hours or more.

Your chatbot should be hitting response times of under 30 seconds for basic questions. Fast response times create positive first impressions and keep customers engaged in the conversation flow.

Customer satisfaction scores matter tremendously for long-term success. Most chatbot platforms let you add a simple rating system at the end of conversations. Ask customers to rate their experience on a scale of 1 to 5, where anything above 3.5 is generally acceptable and scores above 4 indicate excellent performance. These scores provide direct feedback about your chatbot's effectiveness and highlight areas needing attention.

Lead generation metrics deserve special attention since they directly impact your bottom line. Track how many email addresses, phone numbers, or other contact details your chatbot collects each week. More importantly, measure the quality of these leads by tracking how many turn into actual customers. This conversion data helps you understand the true business value of your chatbot investment.

Don't forget to calculate **time saved** through automation. Track how much time you spend answering questions for one week. Focus on questions your chatbot could handle and multiply that by your hourly value to see the real dollar impact of automation. This calculation often reveals significant cost savings that justify further chatbot investment.

While basic metrics give you a good overview, deeper analytics reveal opportunities for improvement. **Conversation flow analysis** shows you where people drop out of conversations most often. These drop-out points usually indicate confusing questions or missing information that need immediate attention.

Peak usage times tell you when customers need help most. You might discover peak support times, like 10 PM on weeknights or early Sunday mornings. This information can help you optimize your chatbot responses for these high-traffic periods and ensure your most important information is readily available during busy times.

Error tracking is crucial but often overlooked. Your chatbot should log every time it can't understand a customer's question. It should also track when it transfers someone to human support. These "failure points" are actually goldmines for improvement opportunities that can significantly boost your completion rates.

Learning from Customer Interactions

Every conversation your chatbot has is like a free focus group session. Customers tell you exactly what they want to know, how they ask questions, and what frustrates them. The key is knowing how to extract these insights from your conversation logs and transform them into actionable business improvements.

Start by reading through a sample of conversations each week. Look for patterns in the questions people ask. If multiple customers ask about your return policy, this information needs to be more prominent on your website. These patterns reveal gaps in your current information architecture and customer communication strategy.

Pay attention to the language customers use, as they might call your products by different names than you do. Focus on the terms customers use. If they call your products "widgets" but your bot says "tools," update the bot's vocabulary to match. This alignment between customer language and bot responses dramatically improves understanding and completion rates.

Seasonal patterns emerge quickly when you analyze conversation data over time. A landscaping business might notice seasonal patterns, like snow removal questions in October and lawn care inquiries in March. Use these insights to proactively update your chatbot's featured responses and prepare for predictable demand cycles.

Failed conversations are actually your most valuable learning opportunities. When customers can't get help from your chatbot, they're showing you exactly where your business knowledge base has gaps. Create a monthly report of these failed interactions and use them to guide your improvement efforts. Each failed conversation represents a potential future success once you address the underlying knowledge gap.

Customer feedback within conversations provides direct improvement guidance. When someone says, "I wish you could help me with scheduling," they're literally telling you what feature to add next. This feedback is more valuable than any market research because it comes from real customers with genuine needs.

During your monthly review, identify the three most common unanswered questions and add these answers to your bot's knowledge base. This simple practice will steadily improve your completion rates over time. Update your chatbot's greeting messages seasonally to keep content fresh and relevant. A costume shop might promote Halloween items in September, then switch to holiday parties in December.

Test new conversation flows with small groups before rolling them out to everyone. Ask a few loyal customers to try new features and give you honest feedback. This prevents you from launching improvements that actually make things worse.

Document what works and what doesn't in a simple log of changes and their results. This documentation helps you avoid repeating mistakes and gives you confidence in successful strategies.

Scaling and Expanding Success

Once your chatbot is performing well in its initial role, you can start expanding its capabilities. The important thing is to scale thoughtfully. Build on proven successes rather than trying to do everything at once. This measured approach ensures that each new feature works properly before adding complexity.

Adding new features works best when you follow customer demand. If conversation logs show many people asking about appointment scheduling, that's your cue to add booking functionality. Let customer needs guide your expansion rather than chasing the latest chatbot trends. This customer-driven approach ensures that new features will actually be used and valued.

Integration opportunities multiply as your chatbot proves its value. Connect it to your email marketing system to automatically add leads to your newsletter, and link it with your inventory system to provide real-time product availability. Each integration makes your chatbot more valuable and reduces manual work for your team.

Multi-channel expansion can multiply your chatbot's impact significantly. Once it works well on your website, consider expanding to other platforms like Facebook or WhatsApp. The same conversation flows often work across different platforms with minor adjustments, allowing you to reach customers wherever they prefer to communicate.

Advanced features like appointment booking, payment processing, or detailed product recommendations become viable once you've mastered basic customer service and lead generation. These complex features require more setup time but can dramatically increase your chatbot's business value and customer satisfaction.

Staff training becomes more important as your chatbot grows in capability and importance. Make sure your team understands how to read chatbot reports and handle escalated conversations. They should also know how to update bot responses, how the chatbot fits into your overall customer service strategy, and how to leverage its insights for business improvement.

Remember that growth should feel manageable, not overwhelming. If you're spending more than a few hours per month managing your chatbot, you might be expanding too quickly. The goal is to create systems that reduce your workload, not increase it. Your chatbot's success creates a positive feedback loop where better customer service leads to happier customers, more referrals, and increased revenue.

The most successful small businesses treat their chatbots as evolving assets that grow alongside their companies. They start simple, measure everything, learn continuously, and expand strategically. Your chatbot can become one of your most valuable business tools if you commit to nurturing its development over time.

Success with chatbots isn't about fancy technology or complex conversation flows. It's about consistently providing value to your customers. Use the insights you gain to make better business decisions. Every conversation is an opportunity to learn, improve, and grow your understanding of what your customers truly need.

MAKING YOUR DECISION

Six months from now, you'll either be wondering why you waited so long to get a chatbot. Or you'll be grateful you took time to make the right decision for your business. The difference lies in being honest about what your business really needs right now.

You've learned about what chatbots can do. You've seen their benefits and limitations. You understand the different types and how to set them up. Now comes the most important part: deciding if a chatbot is right for your specific business at this moment in time.

This decision isn't about following trends or copying what other businesses do. It's about making a choice that fits your customers, your budget, and your goals. Let's walk through a clear process to help you decide.

Your Personal Decision Framework

Making the right choice starts with being brutally honest about your situation. Not the situation you wish you had, but the one you actually have today.

First, think about your customers. Do they frequently ask the same questions over and over? Do you get inquiries outside business hours that you miss? Are potential customers leaving your website without contacting you? If you answered yes to these questions, a chatbot could help solve real problems.

Next, consider your resources. Setting up a chatbot takes time even with simple platforms, as you'll need to write responses, test conversations, and monitor how it's working. Do you have a few hours each week to dedicate to this project? Can you invest between \$50 and \$200 per month for a good chatbot platform?

Your technical comfort level matters, too. While chatbots are easier to set up than ever before, they still require some learning. You don't need to be a programmer, but you should feel comfortable trying new software and following step-by-step instructions.

Think about your business type as well. Service businesses that book appointments, retailers answering product questions, and restaurants taking reservations tend to see quick wins with chatbots. If your business involves complex consultations or highly emotional situations, a chatbot might not be the best first step.

The Go/No-Go Assessment

Use this framework to assess your readiness. Give yourself one point for each statement that's true for your business: you get the same customer questions repeatedly, customers contact you outside business hours, you want to capture more leads from your website, you have basic computer skills and aren't afraid of new technology, and you can dedicate 2–3 hours per week initially to set up and manage a chatbot. Additionally, consider whether you have room in your budget for \$50–200 per month, your customers are comfortable using technology, and you have a website that gets regular traffic.

If you scored 6 or more points, you're likely ready to move forward with a chatbot. A score of 4–5 means you should consider waiting or addressing some gaps first. Three or fewer points suggest focusing on other business priorities right now.

If you've decided to move ahead, start small and focused. Don't try to build the perfect chatbot from day one. Pick one main goal, like capturing lead information or answering your five most common questions.

Choose a simple, **rule-based chatbot platform** for your first attempt. Popular options include Chatfuel, ManyChat, or Tidio. These platforms offer free trials, so you can experiment without committing money upfront.

Spend a week writing down every customer question you receive, as this becomes the foundation for your chatbot's knowledge base. Start with responses to the most frequent questions, then gradually add more over time.

Plan for a **soft launch**. Test your chatbot with friends or family members first by asking them to try breaking it with unusual questions, then fix any problems before making it live to all website visitors.

Set aside time each week to review conversations and improve responses. Your chatbot will get better as you learn what customers really want to know.

Alternative Paths and Future Planning

Maybe you've decided this isn't the right time for a chatbot. That's perfectly fine. Knowing when not to adopt new technology is just as valuable as knowing when to embrace it.

Focus on improving your current customer service first. Make sure you're responding quickly to emails and phone calls, create a FAQ page on your website to answer common questions, and set up email templates for frequent responses.

Try simpler automation options. Email autoresponders, appointment scheduling tools, or contact forms with better questions might solve your immediate needs. These options provide automation benefits without the complexity of a chatbot.

Keep learning about chatbots without committing yet. Technology improves quickly, and what seems difficult today might be much easier in six months. Subscribe to a few small business blogs that cover automation topics, and you'll know when the time is right.

Build the foundation for future chatbot success. Document your most common customer questions. Pay attention to when people visit your website. Notice patterns in customer behavior that a chatbot might eventually help with.

Moving Forward with Confidence

Perfect timing rarely exists in business. There will always be reasons to wait, more features to consider, or other priorities that seem more urgent. But there's also real value in being an early adopter of tools that can help your business grow.

The small businesses winning today are those willing to try new approaches to old problems. Customer service has been a challenge for as long as businesses have existed, and chatbots offer a new solution that's finally accessible to companies of any size.

Bear in mind that you don't have to commit to chatbots forever. You can try one for a few months and discontinue it if it doesn't work for your business. The cost of trying is relatively low, but the potential benefits could be significant.

Start with realistic expectations. Your chatbot won't revolutionize your business overnight or handle every customer situation perfectly, but it might free up a few hours of your time each week, capture leads you would have missed, or provide better service to customers who visit your website at midnight. Those small improvements add up over time, creating space for you to focus on what you do best while technology handles the routine tasks.

Whether you decide to get a chatbot now or wait until later, you've invested time in understanding this technology. That knowledge will serve you well as automation becomes an even bigger part of how small businesses operate.

Trust your instincts about what's right for your business, as you know your customers, resources, and goals better than anyone else. Make the decision that feels right for your situation today, knowing you can always adjust course as your business grows and changes.

The future of small business customer service is more automated, more responsive, and more efficient. Chatbots are just one tool in that future, and by taking time to understand them now, you're preparing your business for whatever comes next.

Your customers want quick answers and great service, and you want to grow your business without working every hour of every day. A chatbot might be the bridge between those two goals, or it might not be right for you yet. Either way, you now know how to make an informed decision. The next move is yours.

From the founder.

A note on what to do with what you just read.

You don't need to act on every idea in this book. You need to act on *one*. The owners who win with AI are not the ones who study the longest. They're the ones who pick the smallest possible automation, ship it, and let the next move reveal itself.

If, while reading, a specific area in your business kept coming back to mind — that's your starting point. Don't override that signal with a more theoretically correct one.

WHEN THE PHONE WON'T STOP RINGING

Most chatbots are built. Few are built right.

A live chatbot is the easy part. The bot that actually books appointments — handling objections, knowing when to hand off to a human, never sounding scripted — is built differently. That's the work we do for clients running real businesses. Reply to the email this came in or book a Discovery Call — we'll show you what your front desk looks like running 24/7.

— *Brandon Aday, Aday Interactive, Inc.*